
Attendees

Martha Alexander	Cynthia Toddhunter	Betty Gibson
Stacey Havel	Irma San Miguel	Janna Johnson
Vicki Welch	Chris Burns	Jennifer Escamilla
Jennifer Valdez	Mia Cisneros	Dawnann Wilson

Upcoming Changes

- Certified Other Dummy Plan
- 65+ Plan Validations during Enrollment

Discussion Items

Asana

- We will be switching from Trello to Asana.
- Continue to add discussion items in Trello for the time being.

Training

- There are several new employees, and it would be helpful to schedule training for them.
- Reach out to Meredith to schedule

Benefits Dashboard

- Employee facing dashboard for Benefits requested by SBA
- Request to have links on the dashboard automatically log in to providers

Benefits Partner Dashboard

- Dashboard for use by Benefits Partners
- Could contain helpful information such as
 - My Inbox Links
 - Report Links that are better organized (to replace critical reports for benefits partners)
 - Customizable worklets and reports
- Request Working group send list of reports they want on the dashboard

Dual Employment

- How can this be tracked?
- Possible third party software to track and feed into Workday

Cross-Functional Items

Staffing

- Benefits on Hire – Hire Reason
 - This hire reason is not being used
 - Request inactivate the hire reason to prevent erroneous use
 - Map the 60 Day Wait benefit event instead of Benefits on Hire benefit event.

Reporting

- Critical Reports for Benefits Partner
 - Better way to organize and prioritize
 - Who determines the frequency recommendation for the reports
 - Is it possible to include descriptions of the reports in the prompts
 - Sort reports by subject/category
 - ACA
 - TRS
 - Discrepancies
 - Dependents
 - Or sort reports by frequency/priority/time sensitive
 - Change “Critical Reports” to “Reports for Benefits Partner”

Action Items

- Working Group Members add to Trello
 - Suggestions of Reports for Dashboard
- Members reach out to Meredith to schedule Training